**Objective**: Create a Shopify app that allows us to create a collection based on a list of tags that we want to include and exclude.

**Technical requirements:** App must be able to communicate with Alchemer survey reporting and/or Google Sheet, receiving a list of tags to include and exclude and subsequently creating a collection on Shopify.

- As a result of a survey that has been taken by customer <u>and then admin-only</u> <u>questions are completed</u>, you will take from Alchemer/export file
  - When survey response is edited, the collection should update accordingly
  - o customer name
  - Customer email
    - The collection will be labeled with the customer name and address
      - Customer name and email address comes from survey responses
  - o Inclusions are tags in the survey results that have "+" in front
    - Not to be confused with tags that have X+Z to indicate "and" logic
  - Exclusions are tags in the survey results that have "-" in front
- 2. A link to the collection will automatically go to the customer's Shopify profile in the Customer Notes. Email notification of completed collection will be sent every time.
  - Customer cannot see the link, but anyone on the internet with the link can access the link if they have it
  - The collection should not be indexed (searchable) by google, so if someone searches their name or email address on the internet, this collection will not appear
  - App will search our orders and add the collection link to the customers order for a "Box"
  - LATER DEVELOPMENT to be aware of NOT FOR THIS SCOPE
    - Link for customer to edit their survey will be in their Shopify account
- 3. The collection updates in real time according to new products added and as products sell some queue is acceptable, but it should update a couple times daily at a minimum
  - If the inclusions/exclusions of a collection are edited, that should jump to the top of the queue and update almost immediately
- 4. App contains Collection list view, Collection Review page, Collection Builder page
  - Collection Builder page
    - Collections can be created here, without survey response
      - Admin would enter collection
      - name, email if they wish to associate the collection with a customer, inclusions and exclusions
        - If an email is entered, we need to reference that email against our customer list and if a match is found, that collection link should go into the Customer Notes
          - You should be able to assign the same email (the same customer) to multiple collections. In that

- case, the Customer Notes section would have multiple collection links.
- You should also be able to enter multiple emails for any collection, and that collection would be assigned to all of those customers.
- Inclusions and exclusions are typed and entered individually. You type one, press enter, type another, press enter, etc.
  - We can talk about what's involved in making tag entry auto-complete
- Collection List page organized in reverse chronological order shows
  - Collection Name
    - When collection was generated by survey results, the collection name = Survey Name + Date survey last modified
    - When collection is built manually in this app, not from survey results, this name is whatever the admin enters
    - There is an icon next to each collection that you can click to duplicate the collection
      - It will open the collection builder page with the fields filled out and you can edit them, including the name
  - Associated Email
    - When collection was generated by survey results, this name = Customer email address
  - Link to Survey results (when applicable)
- Collection Review
  - All fields are the same as in Collection Builder, but when you are in Collection Review you are viewing a collection that has already been created, so all the fields are already filled out
    - Everything is editable including Inclusions and exclusions
      - You can add or remove emails from the collection, which should update the customer profiles in shopify

## 5. Logic

- Exclusions always trump inclusions
- Tags that are comma separated have OR logic
- o Tags that have "+" between them are "combo rules" and have "and" logic
- Example
  - **Include**: pink, sweatshirt, blue, new york, cat+green
  - Exclude: black, red, pants, pink+sweatshirt
  - Logic
    - Include any products with the tags [pink] or [sweatshirt] or [blue] or [new york] or that have tags {[cat] AND [green]}
    - Exclude any products with the tags [black] or [red] or [pants] or that have tags {[pink] AND [sweatshirt]}

 In effect this means that while pink items will be included and sweatshirts will be included, any sweatshirts that are black, red, or pink will be excluded.

## 6. Survey interaction

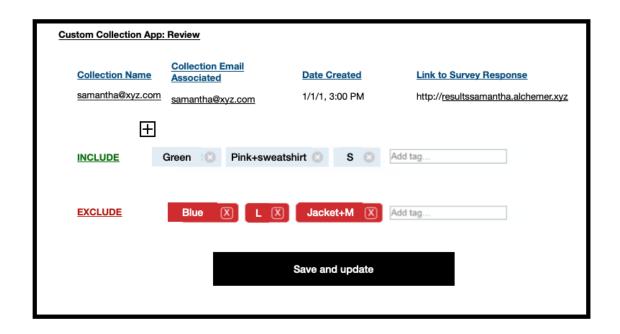
- In the survey, I must be able to note somehow (add some CSS or ?, or open to suggestions) so that there are some questions that you ignore
- I need to be able to indicate on the survey if there are questions whose answers should always be inclusions, even if there isn't a "+" sign in front.
  - For example, when we ask them "what are you into" and they say Lakers and that "Lakers" is in our bank of suggestions that list does NOT contain the "+" sign in front of every value. So I will need a way for the report to append a "+" to every value in a response for some guestions.
    - I'm telling customer to enter anything outside of the suggestions into the comment box. You will IGNORE the comment box.
- o How to deal with customers editing the survey:
  - When admin questions for a given survey are answered there would be a webhook that tells your app " survey ID #1234 is complete".
  - Your app creates a new collection with that survey ID and completion date in the title
  - Now some respondent and subsequently the admin from survey #1234 edit and submit again so your app would get another webhook that says " survey 1234 is complete".
    - Your app would have to check the current collections.
    - If any of your current collections have the survey #1234 association, then the collection would be replaced with the original collection tied to survey 1234, instead of creating a new survey.
    - We CANNOT distinguish a webhook that tells you it's a second-time completion vs. a first time completion of a survey.

Must tell you which questions I want to you to ignore the answer for and which questions I want you to append a "+".

- Questions to answer after getting started
- Can i change the reporting values without messing up the connection to CCA?
- Can i change the order of questions
- Can i change the options of a question

Mockups on next page. \*Note about all mockups: Where it says "Date Created" it should instead be "Last Modified," and that time should update anytime the collection is modified.

Only change to wireframe mock up is <u>When collection was generated by survey results, the collection name = Survey Name + Date survey last modified</u>



## Wireframe

